NORTEL

Nortel Communication Server 1000

IP Phone 2002

Call Center User Guide

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Standard 01.01. This document is issued to support Communication Server 1000 Release 5.0. This document contains information previously contained in the following legacy document, now retired: IP Phone 2002 Call Center User Guide (NN10300-049). This document includes updated content based on CR 01478322. See Telephone display (p. 14). Graphics are also updated.

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Standard 5.00. This document is up-issued to support Nortel Networks Communication Server 1000 Release 4.5. LOGOs and trademark information updated. Document feedback URL added to back page.

August 2005

Standard 4.00. This document is up-issued to support Nortel Networks Communication Server 1000 Release 4.5.

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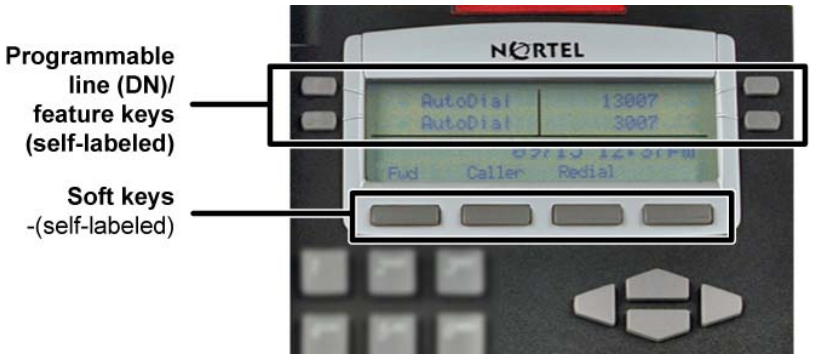
About the Phone

The Nortel IP Phone 2002 brings voice and data to the desktop by connecting directly to a Local Area Network (LAN) through an Ethernet connection.

Note 1: All features are not available on all telephones. Consult your system administrator to verify the features that are available on your telephone.

Note 2: In this guide, programmable line (DN)/feature key labels display beside the key, and soft key labels display directly above the key. Figure 1 illustrates key labels.

Figure 1: Programmable line (DN)/feature key and soft key labels



Basic features

The IP Phone 2002 supports the following features:

- four programmable line (DN)/feature keys (self-labeled)
- four context-sensitive soft keys providing access to a maximum of 10 features

  For information about context-sensitive soft keys, see *New in This Release Communication Server 1000 Release 5.0* (NN43001-115).

Note: Not all IP Phone 2002 sets are configured to support soft key functionality. Consult your system administrator.

- multi-field LCD screen
- call timer to indicate the duration of each call
- speaker for on-hook dialing or on-hook listening
- volume control bar for adjusting ringer, speaker, handset, and headset volume
- six specialized fixed keys:
  - Quit
  - Directory
  - Message (Inbox)
  - Outbox/Shift (reserved for future development)
  - Services
  - Expand to PC
- four call processing fixed keys:
  - Hold
  - Goodbye
  - Handsfree
  - Mute
- shared LAN access with a PC
- headset jack with On/Off key
- automatic network configuration
- hearing-aid compatibility

Figure 2 illustrates the IP Phone 2002.

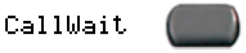
Figure 2: IP Phone 2002

Telephone controls

Note: Some IP Phone 2002 sets include optional key caps. Text in parenthesis indicates labels appearing on the key caps. For example, (Services)

Use the **Volume control** bar to adjust the volume of the ringer, handset, headset, speaker, and Handsfree feature. Press the right side of the rocker bar to increase volume, the left side to decrease volume.

The **InCalls** key is the primary DN key.



Programmable line (DN)/feature keys are extra DNs or feature keys used to access additional features.

A steady LCD light beside a line (DN) key indicates that the line is active. A flashing LCD indicates that the line is on hold.

A steady LCD light beside a feature key indicates that the feature is active. A flashing LCD indicates that the feature is being programmed.

(Goodbye)

Use the **Goodbye** key to terminate an active call.

(Hold)

Press the **Hold** key to put an active call on hold. Press the line (DN) key beside the flashing LED indicator to return to the caller on hold.

(Message)

Press the **Message (Inbox)** key to access your voice mailbox.

Use the **Navigation** keys to scroll through menus and lists on the LCD screen.

(Services)

Press the **Services** key and use the navigation keys to access the following items:

- Telephone Options:
  - — Volume adjustment
  - — Contrast adjustment
  - — Language
  - — Live Dialpad
  - — Date/Time
  - — On-hook default path
  - — Call timer
  - — Display diagnostics
  - — Local dialpad tone
  - — Ring type
  - — Change feature key label
  - — Set Info
  - — Caller ID display order
  - — Normal mode indication
- Password Admin:
  - — Station Control Password
- Display Network Diagnostics Utilities

  Note: Only your system administrator or service provider can use Display Network Diagnostics Utilities to perform Internet diagnostics.

- Virtual Office Login and Virtual Office Logout (if Virtual Office is configured)
- Test Local Mode and Resume Local Mode (if Media Gateway 1000B is configured)

  Note 1: Press the **Services** key to exit from any menu or menu item.

- The **Password Admin** menu many not be available on your IP Phone 2002. Consult your system administrator.

Press the **Headset** key to answer a call using the headset or to switch a call from the handset or handsfree to the headset.

Press the **Speaker** key to activate handsfree. The speaker LED indicator lights to indicate when handsfree is active.

(Directory)

Press the **Directory** key to access directory services.

(Mute)

Your **Mute** key functionality is enabled or disabled by your system administrator. Contact your system administrator to determine if your **Mute** key is enabled.

If your **Mute** key is enabled, press the Mute key to listen to the receiving

party without transmitting your voice. Press the **Mute** key again to return to two-way conversation.

If your **Mute** key is not enabled, pressing the **Mute** key places the call on hold. Press the **Mute** key again to restore the active call or press the line key to restore the active call. You cannot retrieve this call from hold by pressing the Hold key.

The **Mute** key applies to handsfree, handset, and headset microphones. The Mute LED indicator, located on the **Mute** key, flashes to indicate that the microphone is muted.

Soft keys are located below the display area. The LCD label above the key changes, based on the active feature.

> ***Note:*** When a triangle appears before a key label, the feature is active.

Press the **More..** key to access the next layer of **Soft keys**.

When a message is waiting, or there is an incoming call, the red **Message Waiting\Incoming Call Indicator** LED at the top right of the IP Phone flashes. The flash cadence for each alert is different.

Note: You may also hear an audio Message Waiting Indicator (stutter or beeping dial tone) when you go off-hook.

(Quit)

Press the **Quit** key to end an active application. Pressing the **Quit** key does not affect the status of calls currently on your telephone.

The **Expand to PC** key is a fixed key reserved for future development.

The **Outbox/Shift** key is a fixed key that is reserved for future development.

Telephone display

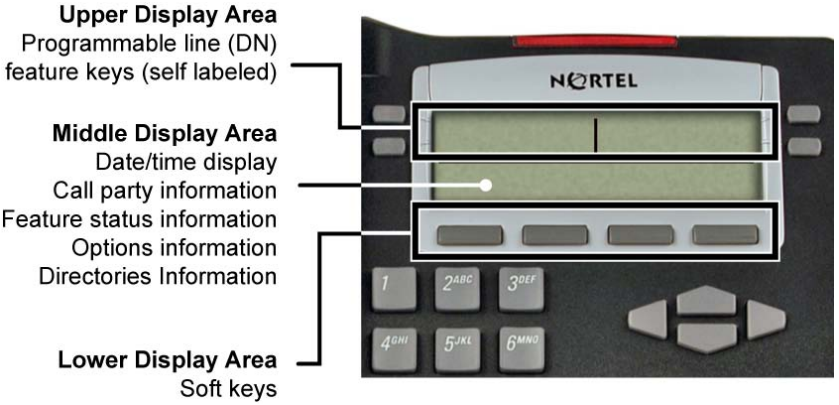
The IP Phone 2002 has three display areas:

- The upper display area provides labels for the four user-defined feature keys.
- The middle display area contains single-line information for items such as caller number, caller name, feature prompt string, user-entered digits, date and time information, and telephone information.

  Because the IP Phone 2002 only has a single-line information display area, you are prompted to scroll through any additional lines of information. For example, during an incoming call, only the Directory Number (DN) appears if the caller name is greater than 10 characters. Press the DN key with the flashing arrow for the caller name to appear.

- The lower display area provides soft key label information.

Figure 3: IP Phone LCD screen



Agent and Supervisor features

This section describes the login features that are common to the Call Center Agent and Supervisor, which are:

- “Logging in an Agent” on page 16
- “Logging in with Agent ID and Multiple Queue Assignments” on page 17
- “Logging out an Agent” on page 21

Logging in an Agent

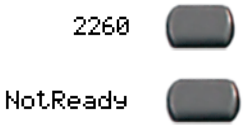
Use the Agent Login to enter an Automatic Call Distribution (ACD) queue. If an Agent ID is assigned to you, the display screen prompts you to enter a four-digit code.

1. Lift the handset.

2. Press the **InCalls** key.

3. If “Enter Agent ID” appears on the screen, use the dial pad to enter your ID.

4. Press the # key. The phone goes into a Not Ready state.



5. To join the ACD queue, choose one of the following:

   — Press the **InCalls** key.

   — Press the **NotReady** key.

6. If you use a headset and Handset On-Hook Means Log out (HOML) is set to **No** by your administrator, then do the following:

   a. Press the **Headset** key and replace the handset in the cradle to receive calls on your headset.

   b. Press the **Services** key. Change the "On-hook default path" to "Headset Enabled".

   Note: If HOML is set to **Yes**, replace the handset to log out of the queue.

Logging in with Agent ID and Multiple Queue Assignments

A Multiple Queue Assignment (MQA) login involves entering a four-digit Agent ID and up to five ACD Directory Numbers (DN), with the option of adding a Supervisor ID and up to five Priority values.

Choose one of the following login procedures:

- "Using Agent ID and MQA login options" on page 18
- "Using Default Login" on page 20

Using Agent ID and MQA login options

To enter ACD queues, use an Agent ID login with one of the MQA login options described on page 19.

> ***Note:*** A supervisor logging in to accept ACD calls is prevented by the system from entering a Supervisor ID (including logon IDs where agents must enter a Supervisor ID).

The login options require the following entries in sequential order:

1. a four-digit Agent ID
2. a Supervisor ID (if your queue requires one)
3. up to five ACD DNs and priority values (if priority values are being used) terminated by # #

To log in:

1. Press the **InCalls** key.

2. Choose one of the following four login options:

— For No Supervisor ID, No Priority, dial your Agent ID # ACD DN 1 # ACD DN 2 # ACD DN 3 # ACD DN 4 # ACD DN 5 # #.

— For Supervisor ID, No Priority, dial your Agent ID # Supervisor ID # ACD DN 1 # ACD DN 2 # ACD DN 3 # ACD DN 4 # ACD DN 5 # #.

— For No Supervisor ID, With Priority, dial your Agent ID # ACD DN 1 # Priority 1 # ACD DN 2 # Priority 2 # ACD DN 3 # Priority 3 # ACD DN 4 # Priority 4 # ACD DN 5 Priority 5 # #.

— For Supervisor ID, With Priority, dial your Agent ID # Supervisor ID # ACD DN 1 # Priority 1 # ACD DN 2 # Priority # 2 ACD DN 3 # Priority 3 # ACD DN 4 # Priority 4 # ACD DN 5 # Priority 5 # #.

Note: To choose the default Priority value or Supervisor ID, enter **#**.

3. Choose one of the following:

— Press the **InCalls** key.

— Press the **NotReady** key to enter the ACD queue.

Using Default Login

Use the Default Login to log in just one time at the beginning of a shift. The Default Login uses your previous shift's login to place you in the same ACD queues and with the same Supervisor.

1. Lift the handset.

2. Press the **InCalls** key.

3. When "Enter Agent ID" appears on the screen, use the dial pad to enter your ID.

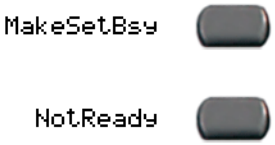
4. Choose one of the following:
   - If your queue requires a Supervisor ID, press the # key three times.
   - If your queue does not require a Supervisor ID, press the # key two times.

5. To join the ACD queue, choose one of the following:
   - Press the **InCalls** key.
   - Press the **NotReady** key.

Logging out an Agent

You can log out of the system completely or temporarily (NotReady state).

To log out:



Choose one of the following:

- To log out completely, press the **MakeSetBusy** key.
- To log out temporarily, press the **NotReady** key.

Note: If you press the **MakeSetBusy** key during an ACD call, you log out automatically when the call finishes.

Agent features

The following sections describe features that are available to agents:

- “Answering ACD calls” on page 22
- “Using Force Call” on page 23
- “Using Activity code” on page 24
- “Using Emergency” on page 25
- “Using Not Ready” on page 25
- “Placing or answering non-ACD calls” on page 26
- “Contacting your supervisor” on page 27
- “Using Record On Demand key” on page 30

Answering ACD calls

Use the **InCalls** key to answer the next queued ACD call on the primary DN. The **InCalls** key is located in the lower right-hand of the programmable line/feature keys.

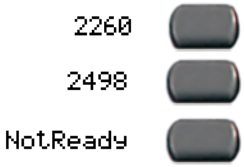
To answer the call:

When the LCD next to the **InCalls** key flashes, press the **InCalls** key.

Note: The LCD remains lit as long as you are on the call.

To terminate the call:

(Goodbye)



Choose one of the following:

- Press the **Goodbye** key.
- Press the **InCalls** key.
- Press the individual **DN** line key. (This removes you from the queue).
- Press the **NotReady** key (this removes you from the queue but keeps you logged in as an agent position) or wait for the caller to terminate the call.

Using Force Call

Use the Force Call feature to automatically connect an incoming ACD call. A time interval is set by your system administrator between each incoming call.

When calls come in, a short tone indicates the new call. The InCall indicator lights continuously and the ACD call automatically goes to your agent position. Pressing the **InCalls** key while call forcing (Auto Answer) is active disconnects an active ACD call.

To enable call forcing for headset users:

1. Log in.

2. Replace the handset.

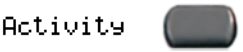
(Services)

3. Press the **Services** key. Set the "On-hook default path" to "Headset Enabled".

Using Activity code

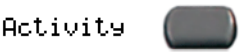
Use Activity code to record the types of activities you are performing.

To record activities:



1. When the Activity LCD indicator is flashing, press the **Activity** key.

2. Use the dial pad to enter the Activity code.



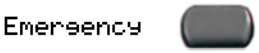
3. Press the **Activity** key.

   If performing multiple tasks, repeat these steps.

   Note: If configured, Activity codes can be entered while in the NotReady state.

Using Emergency

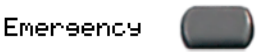
Use the Emergency feature to contact your supervisor immediately in an emergency situation.



1. During an active call, press the **Emergency** key.

   Note: The Emergency LCD remains lit as long as the feature is active.

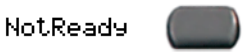
   When the supervisor answers, a three-way call commences with you, your supervisor, and the caller.



2. Press the **Emergency** key again to transfer the caller to the supervisor and terminate your access to the caller and supervisor.

Using Not Ready

Use the Not Ready feature to take your telephone out of the call queue while completing post-call work.



1. Press the **NotReady** key to temporarily logout of the system.

   Note: The NotReady LCD remains lit as long as the feature is active.

2. To return to the queue, choose one of the following:
   - — Press the **InCalls** key.
   - — Press the **NotReady** key.

Placing or answering non-ACD calls

Use this feature to receive and place calls on your individual line.

To place a call:

1. Press your individual DN key.

2. Use the dial pad to dial the telephone number.

   Note: The LCD remains lit as long as you are on the call.

To answer a call:

When the LCD next to your individual DN key flashes, press the DN key.

Note: The LCD remains lit as long as you are on the call.

Contacting your supervisor

Use the Supervisor feature to talk to your supervisor in the following ways:

- “To answer a call from your supervisor:” on page 27
- “To answer a call from your supervisor when on another call:” on page 27
- “To place a call to your supervisor:” on page 28
- “To conference in your supervisor during a call in progress:” on page 28
- “To transfer a call to your supervisor during a call in progress:” on page 28

To answer a call from your supervisor:

Supervisor

When the LCD next to the **Supervisor** key flashes, press the **Supervisor** key.

Note: The LCD remains lit as long as you are on the call.

To answer a call from your supervisor when on another call:

Supervisor

The LCD next to the Supervisor key flashes and a buzzer sounds.

(Hold)

1. Press the **Hold** key to put the current call on hold.

Supervisor

2. Press the **Supervisor** key.

   Press the line (DN) key beside the flashing LED indicator to return to the caller on hold.

To place a call to your supervisor:

Supervisor

Press the **Supervisor** key.

Note: Calls are automatically put on hold when you use the Supervisor key.

To return to the ACD call:

2260

Press the **InCalls** key.

To conference in your supervisor during a call in progress:

Supervisor

1. Press the **Supervisor** key to talk privately with your supervisor.

Supervisor

2. Press the **Supervisor** key again for a conference call with your supervisor, yourself, and the other caller.

To transfer a call to your supervisor during a call in progress:

Supervisor

1. Press the **Supervisor** key.

2. When your supervisor answers, press the **Supervisor** key again.

(Goodbye)

3. Press the **Goodbye** key to terminate your access to the call.

Using Record On Demand key

f this feature is enabled, you can use the Record on Demand (ROD) feature key to record your telephone conversation.

Press the **ROD** key to start or stop the call recording. This key is associated with the active user ID and is displayed only if a call is active. The **ROD** key blinks while it is connecting to the call recording application, and is lit when the call is recording.

The **ROD** key is displayed in the following scenarios:

Normal operation - Press the **ROD** key during an active call to record the call.

Call Recording (CR) application in ROD Mode - Press the **ROD** key during an active call to record the call

Bulk Recording - For an active call or unregistered DN/Position ID, call recording is initiated even though the **ROD** key is not pressed..

Press the **ROD** key during an active call.

To stop the call recording, press the **ROD** key again.

Using SAVE key

Use the **SAVE** feature key to save the recording of an active call. This key is associated with the active user ID and is operational only if a call is active.

The **SAVE** key is displayed in the following scenarios:

Normal operations - If the **SAVE** key is pressed during an active call, the call is saved.

CR application in Bulk Record + Save everything mode - Recorded conversation is saved at the end of the call. If the **SAVE** key is pressed, then the call is not saved.

CR application in Bulk Record + Delete everything mode - Recorded conversation is deleted at the end of the call. If the **SAVE** key is pressed, then the call is saved.

The **SAVE** key lamp status depends on the status of the call recording. If the call is to be saved, then the lamp is lit..

Press the **ROD** key during an active call.

To stop the call recording, press the **ROD** key again.

Press the **SAVE** key to save the conversation.

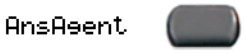
Supervisor features

The following sections describe features available to the Supervisor:

- “Using Answer Agent” on page 32
- “Using the Agent key” on page 33
- “Using Answer Emergency” on page 33
- “Using Call Agent” on page 34
- “Using Interflow” on page 34
- “Using Night Service” on page 35
- “Observing a call” on page 36

Using Answer Agent

Use the Answer Agent feature to receive calls from agents in a non-emergency situation.



1. When the LCD next to the Answer Agent key flashes, press the **Answer Agent** key.

   Note 1: The Agent ID of the individual contacting you displays on your telephone.

   Note 2: The LCD remains lit as long as you are on the call and your status changes to NotReady.

(Goodbye)

2. Press the **Goodbye** key to end the call.

Using the Agent key

Use the Agent feature to connect, observe, or monitor the status of each agent position. Each **Agent** key links to a particular agent position and can be used along with the **Call Agent** or **Observe Agent** keys.

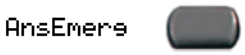
Table 1 lists the four states of the LCD indicator.

Table 1: Agent's status

LCD screen	Description
Off	Agent is not logged in.
On	Agent is logged in but either NotReady or on a call.
Slow Flashing	Agent is waiting for an ACD call.
Fast Flashing	Agent is on a non-ACD call.

Using Answer Emergency

Use the Answer Emergency feature to receive calls from agents in an emergency situation.



1. When the LCD next to the **Answer Emergency** key flashes, press the **Answer Emergency** key.

   Note 1: The Agent ID of the individual contacting you displays on your telephone.

   Note 2: The LCD remains lit as long as you are on the call and your status changes to NotReady.

(Goodbye)

2. Press the **Goodbye** key to end the call.

Using Call Agent

Use the Call Agent feature to contact an agent.

CallAgt

1. Press the **Call Agent** key.

Agentkey

2. Choose one of the following:
   - Press a selected **Agent** key.
   - Dial the agent's Position ID.

(Goodbye)

3. Press the **Goodbye** key to end the call.

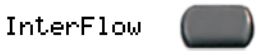
Using Interflow

Use the Interflow feature to redirect calls when the backlog or wait time exceeds a pre-defined threshold.

InterFlow

1. Press the **Interflow** key.

   Note: The Interflow LCD flashes while the feature is active.



2. Press the **Interflow** key again to deactivate the feature and resume normal call flow.

Using Night Service

Use the Night Service feature to define how calls are handled outside of business hours.

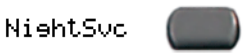
To activate Night Service:

1. Press the **Night Service** key.

2. Press the **6** key (6 = N for Night) to go into Night Service.

   The Night Service LCD lights continuously. All calls in the queue and new calls receive Night Service.

To transition to Night Service:

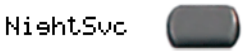


1. Press the **Night Service** key.

2. Press the **8** key (8 = T for Transition) to activate Transition mode.

   The Night Service LCD flashes. All calls in the queue remain in the queue and new calls receive Night Service.

To deactivate Night Service:



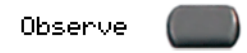
1. Press the **Night Service** key.

2. Press the **3** key (3 = D for Day) to resume Day mode.

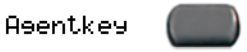
   The Night Service LCD flashes. New calls enter the queue.

Observing a call

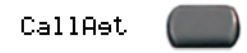
Use the Observe feature to monitor an agent in a call.



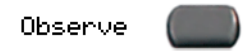
1. Press the **Observe** key.



2. Choose one of the following:
   - Press a selected **Agent** key.
   - Dial the agent's Position ID.



3. Press the **Call Agent** key to talk to the agent you are monitoring.



4. Press the **Observe** key to terminate the observation.

Accessories

Nortel IP Phone Key Expansion Module (KEM)

The Nortel IP Phone Key Expansion Module (KEM) is an optional hardware module that provides additional line appearances and feature keys to your IP Phone 2002. You can connect up to two KEMs to your IP Phone 2002, providing a total of 48 additional keys.

Figure 4: The IP Phone KEM

For more information about the KEM, consult the *IP Phone Key Expansion Module (KEM) User Guide* (NN43119-102).

Terms you should know

Attendant

A telephone operator in your organization.

AutoDial

A telephone number programmed on the **AutoDial** key for one-touch dialing.

Nortel Communication Server 1000

An office communication system.

Date/Time display

The current date and time when the telephone is in an idle state.

Directory key

Enables access to Corporate Directory, Personal Directory, Redial List, and Callers List.

Directory Number (DN)

A number consisting of one to seven digits for a telephone. Also known as an *extension number*.

Expand to PC

A fixed key on your telephone reserved for future feature development. An audible non-working tone is generated along with a display message “Service not available” if this key is pressed.

Fastbusy

A signal given when all outgoing lines are busy.

Feature display

An area that shows status information about the feature in use. It also displays the name and status of the active session.

Fixed key

The hard-labeled keys on your telephone.

Goodbye key

A fixed key used to end an active call.

Handsfree

A method of conversing with the party on the other end of the line without lifting your handset.

Headset key

A fixed key used to answer a call using the headset.

Hold key

A fixed key used to place an active call on hold.

Information display

Any display of call activity, lists, prompts, and status of calls. On the Nortel IP Phone 2002, the information area is a 1-line by 24-character display. If the text message exceeds this area, a scroll arrow icon indicates that you must use the scroll keys to view the remaining text.

Information line

A 1-line by 24-character area that displays date and time or application information.

Interrupted dial tone

A broken or pulsed dial tone, heard when you access some features on your telephone.

Nortel IP Phone Key Expansion Module (KEM)

An optional hardware module which provides additional line appearances and feature keys to your IP Phone. Up to two KEMs can be attached to your IP Phone 2002, providing a total of 48 keys.

Message (Inbox)

A fixed key on your telephone which connects to your voice messaging system when the key is pressed.

Message waiting indicator/Incoming call indicator

An LCD or an LED that indicates the status of a feature by the flash, wink, steady on, or off.

Meridian 1

An office communication system.

More..

An option allowing access to the multiple layers of the soft keys. Soft keys are the four keys located directly below the display area.

Mute key

A fixed key used to listen to the caller without transmitting.

Navigation key

Up/Down and Left/Right keys used to scroll through menus and lists appearing on the LCD screen.

Off-hook

Any line selected to make a call or receive an incoming call. The term *off-hook* is applied whether (a) the end-user lifts up the handset, (b) the end-user presses a line key, (c) the call is automatically answered at the set, or (d) a line is automatically selected for an outgoing call.

Outbox/Shift key

A fixed key reserved for future feature development.

Primary Directory Number

The main extension number on your telephone.

Programmable line (DN/feature keys (self-labeled)

The four keys located at the sides of the upper area of the display.

Quit key

A fixed key on your telephone that is used to exit applications.

Ringback/ring tone

A sound indicating that a call you have made is ringing at its destination.

Services key

A fixed key used to access options such as Telephone Options, Password Admin, Display Network Diagnostics Utilities, Virtual Office Login, Virtual Office Logout, Test Local Mode, and Resume Normal Mode.

Soft keys

A set of keys programmed by your system administrator. These four keys located directly below the display area have four programmable layers. The layers are accessed through the **More...** key. These keys are also used to configure parameters in the **Telephone Option** menu.

Speaker key

A fixed key used to activate Handsfree.

Special dial tone

The three consecutive tones followed by dial tone that you hear when accessing telephone features.

Status messages

A message displayed to inform the user of important information. A right arrow appears if more than one Status Message is present. Examples of Status Messages include: Message Waiting, All Lines Forwarded to: 6453, Do Not Disturb On, Ring Again active, Ringer is OFF, and Line x Unavailable.

System or Switch

Your office communication system.

Switchhook

A button that the handset presses down, disconnecting your call when you replace the handset. The handset (when lifted) releases the switchhook and you either answer an incoming call or you receive a dial tone to make a call.

User Interface

Screen displays that interact with the end user as a result of an action or event.

Volume control bar

A rocker bar you press to increase or decrease the volume of the ringer, handset, headset, speaker and the Handsfree feature.

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Nortel Communication Server 1000

IP Phone 2002

Call Center User Guide

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